

Agenda

Medicare Update Medicare basics Long-term care problem Part B enrollment Medicare Advantage	<i>T. Berthelot</i>
Important Developments in Health Care, Long Term Care, and Payment Schemes Deficit Reduction Act regulations Annuities: Update Application and submission rules	<i>G. Bickford</i>
Medicaid: Long-Term Care Planning, Estate Planning and Asset Transfers History of Connecticut Medicaid program Eligibility criteria Covered services Spousal impoverishment rules Transfer of asset rules Penalties and disqualification periods, transferee liability, exceptions	<i>G. Bickford</i>
Financial Planning for the Elderly and Disabled Asset protection: estate planning considerations Exempt or excluded assets Using trusts and advanced planning techniques New legislative changes and potential problems	<i>G. Bickford</i>
New and Expanded Restrictions on Medicaid Planning Viability of asset transfers Use of trusts Use of annuities Viability of Medicaid planning	<i>G. Bickford</i>
Looking Ahead: What's Visible on the Horizon? Recovery? Third party liability Home care issues Retroactive eligibility for home care	<i>G. Bickford</i>

29th Connecticut Medicaid and Medicare Planning Update 2020

North Haven, CT - Friday, February 28, 2020



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Learning Objectives

You'll be able to:

- Discuss** Medicare basics, coverage issues and, problems with long-term care.
- Discuss** Medicaid eligibility criteria and covered services.
- Review** Medicaid spousal impoverishment rules, asset transfer rules, and more.
- Understand** Medicaid application and submission rules.
- Explore** asset protection planning strategies.
- Consider** the use of trusts and annuities in Medicaid planning.



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- Discuss** Medicare basics, coverage and Medicare Advantage
- Understand** Medicaid application and submission rules
- Learn** about Medicaid eligibility, covered services, and asset transfer rules
- Examine** long term care planning for protection of assets
- Analyze** new restrictions on Medicaid planning
- Discuss** home care issues
- Explore** the use of trusts and annuities

Continuing Education Credits

Attorneys 6.5 Connecticut CLEHours 6.5 New Hampshire CLE Hours 8.0 New Jersey CLE Hours 8.0 New York CLE Hours 6.5 Vermont CLE Hours	Accountants 8.0 CPE Hours Certified Financial Planners 8.0 Continuing Ed. Hours
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George B. Bickford *Law Offices of George B. Bickford, East Granby, CT*
Mr. Bickford is a graduate of Harvard College and the University of Connecticut School of Law. From 1974 through 1981 he was employed by Neighborhood Legal Services, Inc. During his last three years there he was director of the Senior Citizens Law Project covering North Central Connecticut. From January 1982 through October 1992 Mr. Bickford was a partner in the firm of Weed & Bickford (formerly Weed, Kerrigan & Bickford), engaged in the general practice of law. On November 1, 1992 he opened the Law Offices of George B. Bickford as a sole practitioner in East Granby, Connecticut and, as of July 1, 2009, the firm is known as the Law Offices of George B. Bickford, LLC. The office consists of two attorneys and a highly trained paralegal staff concentrating in elder law issues. For many years Mr. Bickford has been a guest speaker before bar, medical, social service and public groups on the topics of Social Security, Medicaid and estate planning for the elderly with long-term medical needs, the area in which he currently limits his practice. Mr. Bickford was a member of the Board of Directors of the Alzheimers Association Connecticut Chapter for many years, and he continues to provide them counsel and assistance. He is also a member of the National Academy of Elder Law Attorneys and the Executive Committee of the Elder Law Section of the Connecticut Bar Association.

Terry Berthelot, MSW, JD *University of Connecticut, Storrs-Mansfield, CT*
Ms. Berthelot is an assistant professor in residence of Human Development and Family Studies at the University of Connecticut. She is also the director of the Aging Research Interest Group. Her research and advocacy is primarily about access to healthcare for people who are over 65 and for people with disabilities. She earned her Masters degree in social work from Syracuse University, after which she designed, implemented, and then coordinated a Joint Commission

accredited hospice program in the Mississippi delta. Finding herself fascinated by the legal and ethical questions surrounding death and dying, Ms. Berthelot pursued her law degree at the University of Mississippi. After graduating, cum laude, Ms. Berthelot joined the Center for Medicare Advocacy, a national not-for-profit law firm. As a senior attorney, Ms. Berthelot oversaw the Center’s advocacy efforts. She also provided legal advice and representation to Medicare beneficiaries unfairly denied Medicare coverage or access to healthcare, wrote articles for national publications, produced educational materials, engaged in educational outreach activities with a particular focus on the Medicare hospice benefit, was a contributing author to the Medicare Handbook, and served as co-counsel for federal class action lawsuits challenging improper Medicare policies. Also while with the Center, Ms. Berthelot was the lead Medicare trainer for Connecticut’s State Health Insurance Assistance Program and for Connecticut’s Medicare Senior Patrol. Ms. Berthelot is a former chair of the steering committee for the National Academy of Elder Law Attorneys’ Health Care Section and she is the former Connecticut liaison for National Healthcare Decisions Day. She is currently a member of the Mansfield Town Council.

Here’s what past attendees had to say about the program and presenters
George Bickford and Terry Berthelot:
“Interesting and informative.” – *Paralegal*
“Always learn something new every year!” – *Financial Counselor*
“Great meeting.” – *Certified Financial Planner*
“Excellent presentation.” – *Attorney*



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8:30 - 11:45 am
Lunch (On your own)
11:45 am - 12:45 pm
Afternoon Session
12:45 - 4:40 pm

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Continuing Education Credit Information

This course is open to the public. This intermediate level, group live course offers 8.0 CPE hours in the field of administrative practice. A basic understanding of Medicaid and Medicare is recommended, and no advance preparation is necessary.

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This event offers Connecticut attorneys 6.5 CLE hours. HalfMoon Education is a New York-approved provider of CLE. This traditional format, Areas of Professional Practice seminar, offers 8.0 CLE hours to new and experienced attorneys. HalfMoon Education is approved as a CLE provider in Vermont, and this course qualifies for 6.5 CLE hours. This course offers 6.5 CLE hours to New Hampshire attorneys. Course approval is not required in New Hampshire. HalfMoon Education Inc. is a New Jersey CLE Service Provider (No. 164), and this course offers 8.0 CLE hours to New Jersey attorneys.

HalfMoon Education Inc. is a CFP Board-Registered continuing education Sponsor. The Certified Financial Planner Board of Standards, Inc. has granted 8.0 credits of continuing education credit for the completion of this seminar.

Attendance will be monitored, and attendance certificates will be available after the seminar for most individuals who complete the entire event. Attendance certificates not available at the seminar will be mailed to participants within fifteen business days.

Can’t Attend? Order the Manual and Audio from the Live Seminar as a Self-Study Package!

Audio recordings of this seminar are available for purchase starting at \$269. See registration panel for more information and please refer to specific state licensing rules or certification requirements to determine if this learning method is eligible for continuing education credit.

Registration

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() **I am not attending.** Please send me the self-study package:

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